

Client Onboarding Guide

Welcome! We're excited to support your grant journey. This guide outlines our process, what to expect, and how to get the most out of our partnership.

1. Our Services

We offer the following services:

- Grant Research & Identification: We match you with funders that align with your mission and eligibility.
- Grant Writing and Editing: We craft or review compelling proposals to increase your chances of funding.
- Grant Consultation: We help you assess readiness and develop funding strategies.
- Grant Retainment: Subscribe to receive monthly grant opportunities and Compact/Moderate proposal support.

2. Getting Started

To begin, please complete the Grant Intake Form provided. This gives us the information needed to assess your eligibility and funding alignment.

Once received, we will review and schedule a follow-up call if needed.

3. Communication & Workflow

Our typical process:

1. Intake Form Submission
2. Service Agreement & Payment (if applicable)
3. Initial Research or Draft Begins
4. Review & Revisions
5. Final Submission/Delivery

You'll receive updates via email. For quicker turnaround, please respond within 2 business days to revision requests or clarifications.

4. Turnaround Times

Turnaround times vary based on service:

- Grant Research: 5–7 business days
- Compact Proposal: 7–10 business days
- Moderate Proposal: 10–15 business days

Rush services are available for an additional fee.

5. Expectations & Responsibilities

What we need from you:

- Timely communication and document sharing
- Clear and honest information about your organization and goals
- Feedback on drafts within 2–3 days

What you can expect from us:

- Professional, timely, and customized service
- Open communication and transparency
- Quality writing and strategy aligned with funder expectations

6. Next Steps

1. Complete and return your Grant Intake Form
2. Sign service agreement and submit payment (if required)
3. We begin your service!

Have questions? Reach out via the contact info provided on your invoice or welcome email.